

New Councilmember Onboarding Outline

- Section 1. Introduction to the City Organization (20 Minutes)
- Section 2. Council Specific Information (30 Minutes)
- Section 3. Legal Update and Considerations while on Council (50 minutes)
- Section 4. Council Meeting Protocols (20 Minutes)
- Section 5. Policy Role in Land Use Planning (60 Minutes)
- Section 6. Financial Responsibilities, Budgeting and Performance Measurements (45 Minutes)
- Section 7. Community Engagement and Communication (20 Minutes)
- Section 8. Emergency Preparedness (20 Minutes)
- Section 9. Department Topics and Q&A (30 Minutes)

Section 1. Part 1. Introduction to the City Organization (20 Minutes)

- 1.1. Refreshing overview of the Departmental structure, services and ELT Contacts
- 1.2. Relationships between City Council and City Staff, Council Appointed Officers (CAOs) and the public
 - A. Role of the City Councilmember/Local Elected Official
 - B. Role of the City Manager
 - C. Role of the City Attorney
 - D. Role of the City Clerk
 - E. Role of the City Auditor

Section 2. Council Specific Information (30 Minutes)

Council-specific information includes all the items that relate to Councilmembers themselves in their new role.

- 2.1. Conduct & Expectations
- 2.2. Overview of Procedures & Protocols Handbook's and notable norms
- 2.3. Regulatory Guidelines
- 2.4. Required trainings
- 2.5. Council Strategic priorities
- 2.6. Councilmembers' roles regarding council subcommittees and service on regional boards, outside agencies and committees

- 2.7. Travel, Conferences and Training opportunities
- 2.8. CAO evaluation cycle
- 2.9. Special Council Events (Reorganization, State of the City, Strategic Planning, etc)

Section 3. Legal Update and Considerations while on Council (50 minutes)

- 3.1. Basics on City legal structure: Charter City, with a council-manager form of government. What is an ordinance. What is a resolution. How the City fits within the State and Federal governments.
- 3.2. Explanation of Council's primary roles: (a) policymaking/legislative; and (b) quasi-judicial. A brief introduction to the special obligations of the quasi-judicial role.
- 3.3. Key laws governing Councilmembers' behavior:
 - A. Brown Act (including avoiding serial meetings, social media, and maintaining confidentiality of closed sessions)
 - B. Political Reform Act/conflicts of interest
 - C. Public Records Act (including personal devices)
- 3.4. Update on Legal Advice related to 2025 Council Work. Confidential under Attorney/Client Privilege, Private Session to be Scheduled Separately. Legal Update on confidential advice for current issues.

Section 4. Council Meeting Protocols (20 Minutes)

- 4.1. Logistics: Schedules, seating, attendance, technology, meeting etiquette
- 4.2. Meeting Prep Best Practices
- 4.2.4.3. Agenda Structure
- 4.3.4.4. Rules of Procedure
- 4.4.4.5. Packet production process and schedules, Staff Report timelines
- 4.6. How/when to pose questions or add items to an agenda
- 4.7. Closed session practices

Section 5. Policy Role in Land Use Planning (60 Minutes)

- 5.1. Review of land use planning terms
- 5.2. Role of council in land use matters
- 5.3. Development review/approval process
- 5.4. Role of planning or zoning commissions/boards
- 5.5. Schedule of general plan, precise plans, or other policy documents that are coming to the council in the upcoming year
- 5.6. Housing element; purpose, process, approval and timeline

- 5.7. Preview of development projects that will appear before the council in the upcoming year
- 5.8. Economic Development Program

Section 6. Financial Responsibilities, Budgeting and Performance Measurements

Review the basics of the financial structure and condition to help Councilmembers understand their fiduciary responsibilities.

- 6.1. Fiscal Calendar
- 6.2. Financial position of the City
- 6.3. Explanation of fund structure
- 6.4. Overview of the most recent comprehensive audit and financial report (CAFR)
- 6.5. Operating and capital budget cycle
- 6.6. Investment and treasury policies
- 6.7. Schedule for financial reporting to the council
- 6.8. Unfunded liabilities (e.g., post-employment benefits)
- 6.9. Pension and OPEB Trusts
- 6.10. Performance Tracking

Section 7. Community Engagement and Communication (20 Minutes)

- 7.1. Communications practices with Staff and with the Public, including practices previous Councilmembers have used
- 7.2. Media relations

Section 8. Emergency Preparedness (20 Minutes)

Due to the unique and critical role local governments play regarding emergency preparedness, a briefing on this topic is key.

- 8.1. High-level briefing
- 8.2. Council role in the event of a community emergency
- 8.3. Public Safety organizational structure

Section 9. Department Topics and Q&A (30 Minutes)

- 9.1. Department-specific services
- 9.2. Critical issues and projects for each department
- 9.3. Department heads and their contact information

Digital Resource Library

1. Local Government Resources

- Cal Cities Brown Act Guide
- Cal Cities New Mayors & Councilmembers Academy Session Materials (2024)
- Cal Cities Public Records Act Guide
- Cal Cities Rosenberg's Rules of Order Guide
- Institute for Local Government State Ethics Training Requirements for Local Officials: Frequently Asked Questions
- Statements of Economic Interest (FPPC Form 700) FAQs & Reference Pamphlet

2. City Administrative Resources

- City Charter
- [City Municipal Code](#)¹
- City Organizational Chart
- City Roster
- [Records Portal](#)²
- Travel Arrangements and Expense Reimbursement Policy

3. City Council Operations

- [2024 City Council Priorities](#)³ & Priority Setting Guidelines
- 2024 Council Priority Objectives
- 2025 Meeting Calendar
- Boards, Commissions and Committees Handbook
- City Council Procedures & Protocols Handbook
- Conflict of Interest Resolution

¹ Municipal Code: https://codelibrary.amlegal.com/codes/paloalto/latest/paloalto_ca/0-0-0-59235

² Laserfiche Public Portal: <https://portal.laserfiche.com/Portal/Welcome.aspx?repo=r-704298fc>

³ City Council Priorities: <https://www.cityofpaloalto.org/Departments/City-Clerk/City-Council/City-Council-Priorities>

4. City Financial Resources

- FY 2025 Adopted Capital Budget
- FY 2025 Adopted Operating Budget
- FY 2025 Adopted Municipal Fee Schedule
- FY 2025 – FY 2034 Long Range Financial Forecast
- FY 2023 Annual Comprehensive Financial Report
- [Open Budget Web App](#)⁴

5. Miscellaneous

- 2030 Comprehensive Plan
- 2023 – 2031 Housing Element
- [Infrastructure Plan Projects](#)⁵
- [Open Data Portal](#)⁶

Note: URLs are provided for websites; digital copies of other reference materials will be provided

⁴ Open Budget Web App: <https://palocalto.opengov.com/>

⁵ Infrastructure Plan Projects: <https://www.infrastructure.cityofpalocalto.org/>

⁶ Open Data Portal: <https://data.cityofpalocalto.org/home>